Workshop Objectives:

- CRM Task Force develops a clear focus for what to do in the next two years, how to achieve with milestones.
- Reach concert on roles and responsibilities, procedures, and recommended actions on organizational issues.

Accomplish in the Next Two Years: (Measurable Goals):

Format "By June 2007 the CRM Task Force will (Measurable Outcome)"

- Have hosted 8 to 10 successful training sessions that will have built a network of 15 or more practitioners engaged and trusted in the community helping people both in the development and facilitation of CRM activities with on-the-ground implementation – and be mentors to one another
- Have a diverse, stable funding for five years into the future – eg $1 million on line – be able to identify the on-the-ground enhancements that are directly traceable to efforts funded by the legislature that would not have happened without the funding – documented the number of people, acres and projects completed.
- Have completed xxx outreach efforts that would bring in more landowners, groups, and partners using the CRM process – xxx increase in people, groups, partners
- Have a strong CRM program with support service, available and recognized by local communities and constituents that is established resulting in a smooth, effective and cohesive program delivery and have strong and substantive support from the constituent organizations.

Effective Organizations:

Presentation on research done by Kelsey Gray, Organizational Development Specialist, Washington State University

CRM Task Force Mission, Roles & Responsibilities:

MISSION

To improve resource management by providing support and technical expertise in the development and implementation of coordinated resource management through community-based locally led collaborative processes.

VISION

The CRM program will be well-known and a readily sought out tool and asset… to provide expertise and assistance in achieving voluntary community-based solutions… leading to the enhancement of Washington's natural resources.

SLOGAN
"Partnerships for Stewardship"
Empowering local people to solve land use and natural resource issues, together, through collaborative problem solving

Action Note: Linda to put our organizational framework together

ROLES, RESPONSIBILITIES FOR WASHINGTON STATE CRM
Task Group revised the draft and approved the Roles, and Responsibilities for CRM Washington with changes on 9.6.05.

Organizational Issues & Recommended Actions:

Issue	Desired Outcome	Actions to Resolve
Plan to include detail, methods, how, who will do the work to met the contract obligations Champion – Greg & Linda and Chuck & Norm on editing	Operational plan that people could pick up and see what we are going to do and how we are going to do it fulfill the WSCC contract	1. task group agreement on how to proceed including hiring – by today 2. look at 1999 strategic plan for relevance 3. complete the rest of the details on our current strategic plan – details include training sessions, follow-up to contacts made, maintain the credibility of the program with the public 4. set up a monitoring/tracking program so we know where we are at on each goal.
Staffing issues Champion – Bill & Chuck	Get the right person, get them setup, trained, working with the task group and	1. find out what the WSCC requires for employment – interim and full-time 2. position descriptions and hiring package(s) developed (Linda to email job descriptions) 3. examine hiring interim staff to assist with short term activities or using existing members staff assistance (Norm) & follow through with D. Guenther, L. Hardisty, R. Ledgerwood and WACD 4. set up a mechanism to hire a permanent staff if desired including protocols established for supervision and how direction will be given – (task group, management committee, individual members) 5. work plan established and expectations and evaluation in place before hiring
Production & meeting our	Program is moving forward with more local	1. get the training completed for practitioners – consider a

commitments and show the legislature what we are doing Champion – Linda (training) Norm (lobbying) Angela/Dana	CRM groups assisted, energized and moving forward – mentoring for the new and struggling groups, training completed and being used by practitioners	commitment to assist CRM activities 2. reestablish the contacts with those that have been through the training 3. provide mentoring for existing CRM practitioners 4. lobby NRCS, WADE for assistance, opportunities for exchange of work and TSP 5. put together our facilitator network & examine existing facilitating networks (e.g. Nelson) 6. identify the funding to provide for additional assistance to the CRM groups 7. develop/revise a tracking system to collect accomplishments be made – summarized and review monthly and send with minutes 8. package and share the on-the-ground accomplishments – executive report to the Executive Group, legislators Notes: new CRM activity would take approximately ½ FTE to organize
Funding needs	Increase in program funding for CRM activities, support, and facilitation.	1. complete strategic plan with the associated budget and work force needs 2. send the document to any organization, agency and ask one question "what will you do to assist us achieve what is in our plan?" 3. have someone identified to work on grant requests that match the strategic direction
		▪

Strategic Areas:
- **Training**
- **Direct Assistance**
- **Networking & Promotion**
- **Funding & Organization**

Strategic Priority #1 - Training

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Goal:

By June 2007 the CRM Task Force will have hosted 8 successful training sessions that will have built a network of 15 or more practitioners engaged and trusted in the community, helping people both in the development and facilitation of CRM activities with on-the-ground implementation – and be mentors to one another

Strategies (Ideas):
- Identify a cadre of folks with characteristics – interest, opportunity, ability to serve in a single community as skilled facilitators/practitioners for a period of time
- Determine and schedule what type of training we will do – when and where – match to specific needs
- Arrange for the funding and budget
- Need some type of outreach to attract the audience
- Who will do the training and support services (administration) and where
- Hold training and provide follow-up, mentoring opportunities
- Contact previous trainees
- Need to select students with common interest, commitment and experience
- Complete the work on the handbook as an adjunct to training

Actions	Dates	Responsible	Notes
Bring together the training files	By 9.18.05	Linda H.	
Re-contact with organizations and individuals that had interest	By 9.30.05	Greg (weeds), Norm (WACD, WADE, districts), Ecology .	Get back to Linda and Ray
Development of an overall training plan with target audiences, schedules, and special customized needs	By 10.13.05	Linda & Ray	Look at training session for wildlife managers, weed management, watershed groups, facilitator training
Complete the session designs, curriculum plans developed based on the target audience	By 10.13.05	Ray, Linda Greg (weed)	
Communicate with past students, target audience and conservation districts, regarding the needs, suggestions	By 11.15.05	Interim person	
Complete and print the CRM manual	By xxx	Linda	Draft used for training

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Strategic Priority #2 - Direct Assistance
Goal

By June 2007 the CRM Task Force will have a strong CRM program with support service, available and recognized by local communities and constituents that is established resulting in a smooth, effective and cohesive program delivery and a strong and substantive support from the constituent organizations.

Strategies (Ideas)

Actions	Dates	Responsible	Notes
Develop a statewide list of CRM facilitators			

Strategic Priority #3 - Networking & Promotion
Goal

By June 2007 the CRM Task Force will have completed xxx outreach efforts that would bring in more landowners, groups, and partners using the CRM process – xxx increase in people, groups, partners

Strategies (Ideas)

Actions	Dates	Responsible	Notes
Complete the membership invitation to the WA Environmental Council			

Strategic Priority #4 - Funding & Organization

Goal

By June 2007 the CRM Task Force will have an efficient, effective CRM structure in place with diverse, stable funding for five years into the future – eg $1 million on line – be able to identify the on-the-ground enhancements that are directly traceable to efforts funded by the legislature that would not have happened without the funding – documented the number of people, acres and projects completed.

Strategies (ideas)
- Determine what our staffing needs are including responsibilities, time commitments
- Go ahead with interim assistance and on a tandem track develop hiring package and procedures to hire a full-time position
- See above staffing and hiring actions
- Important to examine the operational authority of the task group – decisions need to be made operationally

Actions	Dates	Responsible	Notes
find out what the WSCC requires for employment – interim and full-time	By 9.16.05	Bill	
Phone and email transferred to Linda for interim	By 9.16.05	Chuck – phone Linda - computer	
Interim staff assistance identified – follow through with Guenther and orientation (answering phone calls, emails, daily operations, contacts), Hardisty (bring together records, training logistics), Ledgerwood (training, plans, mentoring w/Bill), WACD (registration for training)	By 9.30.05	Chuck & Bill	
Determine what our staffing needs are including responsibilities, time commitments			
Position descriptions and hiring package(s) developed / revised, compensation Establish the hiring committee and application, interview and hiring procedures Set up a mechanism to hire a permanent staff if desired including protocols established for supervision and how direction will be given – (task group, management committee, individual members)	By 9.30.05	Bill, Ron, Chuck	Linda to email job descriptions
Advertising for position	By 10.3.05	Bill, Ron, Chuck	Follow WSCC procedures
Hiring procedures implemented, interview, and job offer	xx weeks after advertising	Hiring sub-committee appointed by chair	
Orientation for new employee		Bill, Chuck, chair	

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Regular evaluation and feedback			
Set up a system of backup for CRM Task Group documents including reports, minutes, etc			

Budget Notes:
- Ed – training – 60%, outreach 15%, 3 15%, 4 10%
- Angela – training – 50%, 25% - direct assistance, 12% funding, 12% networking
- Greg 120,000 staff, 30,000 training, 30,000 direct assistance grants, 20,000 tour, handbook printing
- Chuck – 60% staff, 20% support training, 10% outreach, 10% direct assistance
- Norm – 10,000 funding, 40,000 direct assistance, 100,000 staff, 50,000 training
- Linda – training 40% future funding outreach 25% direct assistance 30% networking external and internal assistance 5%
- Bill – 20,000 training, operations 125,000, assistance to groups 50,000, funding and networking 5,000
- Ron – 75% for training and direct assistance, grant writing 10%, outreach 10%, developing a strong program 5%
- Milt – 40% training, networking 10%, direct assistance 30%, promotion and outreach 20%

Other:
- Training budget at 40 to 75%
- Direct Assistance – facilitators, program manager assistance, funds at 25% - 30%
- Suggestion -- salary not to exceed $45,000 but look at duties and description
- Staff position – much more a "doer" than "director"
- Staff Position and logistics at 150,000 and 50,000 for other expenses
- Lay out expectations including grant funding

Budget Notes – Table Format

Individual	Training	Direct Assistance	Networking Outreach	Operations & Funding	Staff
Ed	60%	15%	15%	10%	
Angela	50%	25%	12.5%	12.5%	
Greg	$30,000	$30,000	$20,000		$120,000
Chuck	20%	10%	10%		60%
Norm	$50,000	$40,000		$10,000	$100,000
Linda	40%	30%	5%	25%	
Bill	$20,000	$50,000	$5,000	$125,000 (includes staff, other expenses)	
Ron	75% - combined w/ direct assistance	Combined with training (75%)	10%	15%	
Milt	40%	30%	20%	10%	

Next Chair: Bill will check with WSCC regarding serving as the next chair

Decision Making: address at the next session

Executive Group Agenda: see meeting notes

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